

Pitch the paper clips.



MetaViewer and Microsoft Dynamics® 365 for Operations
come together for the one fully integrated paperless ERP
solution.

Go beyond the electronic filing cabinet to paperless ERP.

Your Microsoft Dynamics 365 for Operations solution has improved the overall effectiveness of your financial and human resource management. You may have noticed, however, that the volume of paper being produced, stored and recycled continues to grow.

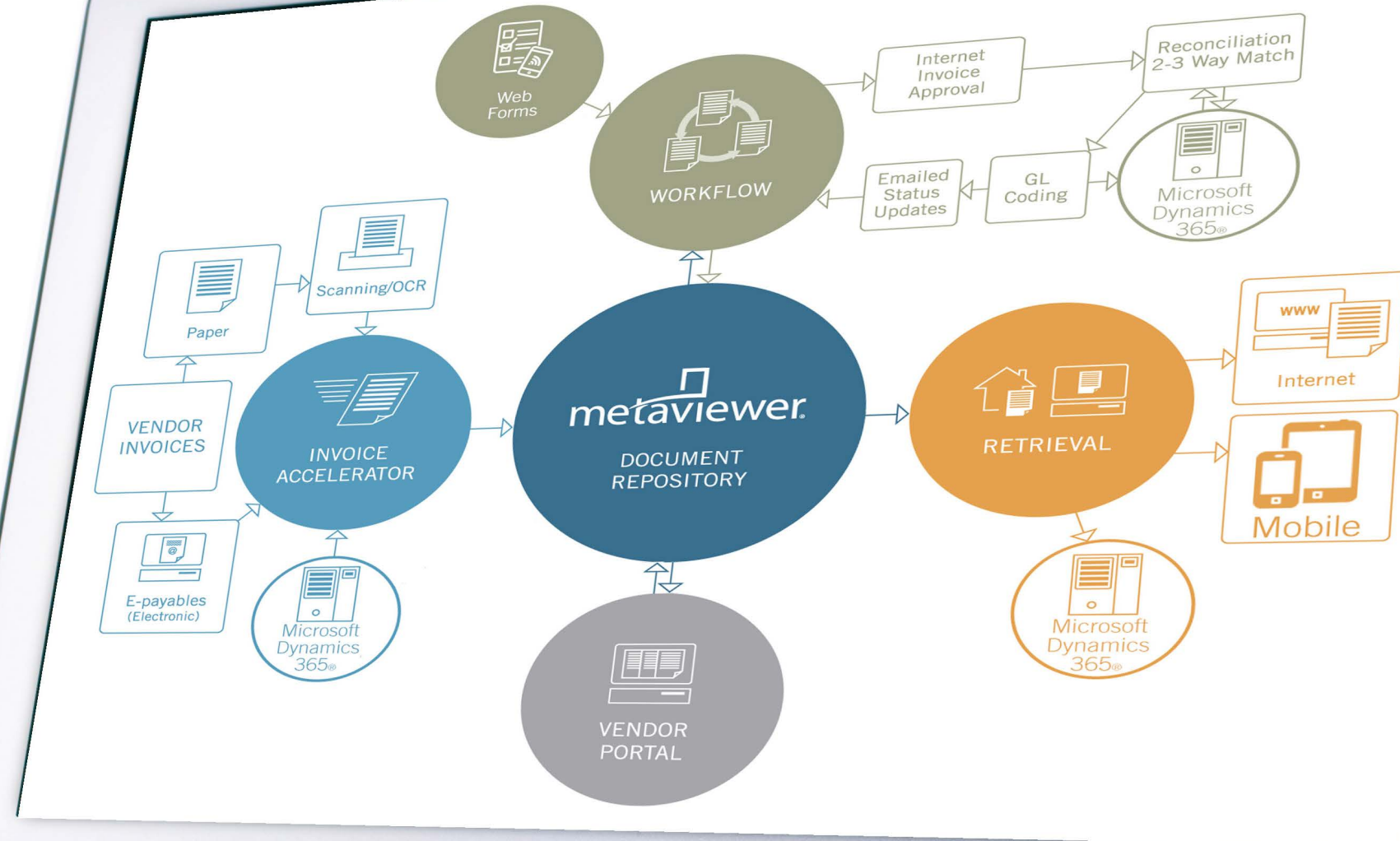
MetaViewer's 100% paperless automation solution—fully integrated with Dynamics 365 for Operations—brings order to the growing chaos using a highly efficient and fully visible process to manage the capture, workflow and storage of your documents. With MetaViewer, you'll experience dramatically increased control of your business information and processes at significantly reduced cost.

Fully automated document capture. MetaViewer's invoice and order capture make it easy for suppliers and customers to provide you with electronic invoices/orders and bypass the scanning process. For invoices and other documents that continue to be received in paper format, MetaViewer employs powerful document recognition technology and full OCR integration to capture every detail to eliminate manual data entry.

Fully intelligent workflow. Documents are routed automatically for review and approval based on your defined business rules. Workflows are adjusted based on key criteria such as due date, invoice amount, workload and time-in-queue.

Fully visible end to end. MetaViewer lets you monitor your financial process from end to end in real-time. No more blackouts due to paper-based processing. Using the MetaViewer Web portal, your vendors, channel partners and customers enjoy direct online visibility to their documents and status updates, providing immediate answers to their questions and fewer phone calls to your staff.

Fully integrated with Dynamics 365 for Operations. No need to learn a new platform. You'll find a MetaViewer button on your ERP screen that takes you directly to all your financial documents—indexed, cross-referenced and organized by transaction "folder" according to your standard business processes.



Jane pitches the paper clips...

She experiences the increased efficiency of paperless invoice capture, automated workflow and real-time visibility.

MetaViewer improves the quality of your accounts payable process and reduces the cost of processing by providing greater efficiency, visibility and control. From purchase order to payment to archive and back, MetaViewer manages and tracks every step of every transaction, giving you a complete, real-time picture of your entire AP process.

No more manual entry or document indexing. MetaViewer Invoice Accelerator recognizes the invoices and reads them, whether electronic or paper. The necessary transaction information is captured and the documents are routed automatically to the next workflow step.

Fully automated, Web-based workflow. Documents needing approvals are routed automatically to the appropriate individuals—and you'll know where each document is, as well as causes of delay or issues of concern, so you can better manage the process.

Documents organized automatically by transaction. Once a transaction is uploaded to Dynamics 365 for Operations, users can access documents from there or MetaViewer to see the complete audit trail. MetaViewer automatically links related documents to give users a complete view of the transaction history (who, what, when, where) and all the data necessary for further decision-making.

... and gets on the Fast Track.

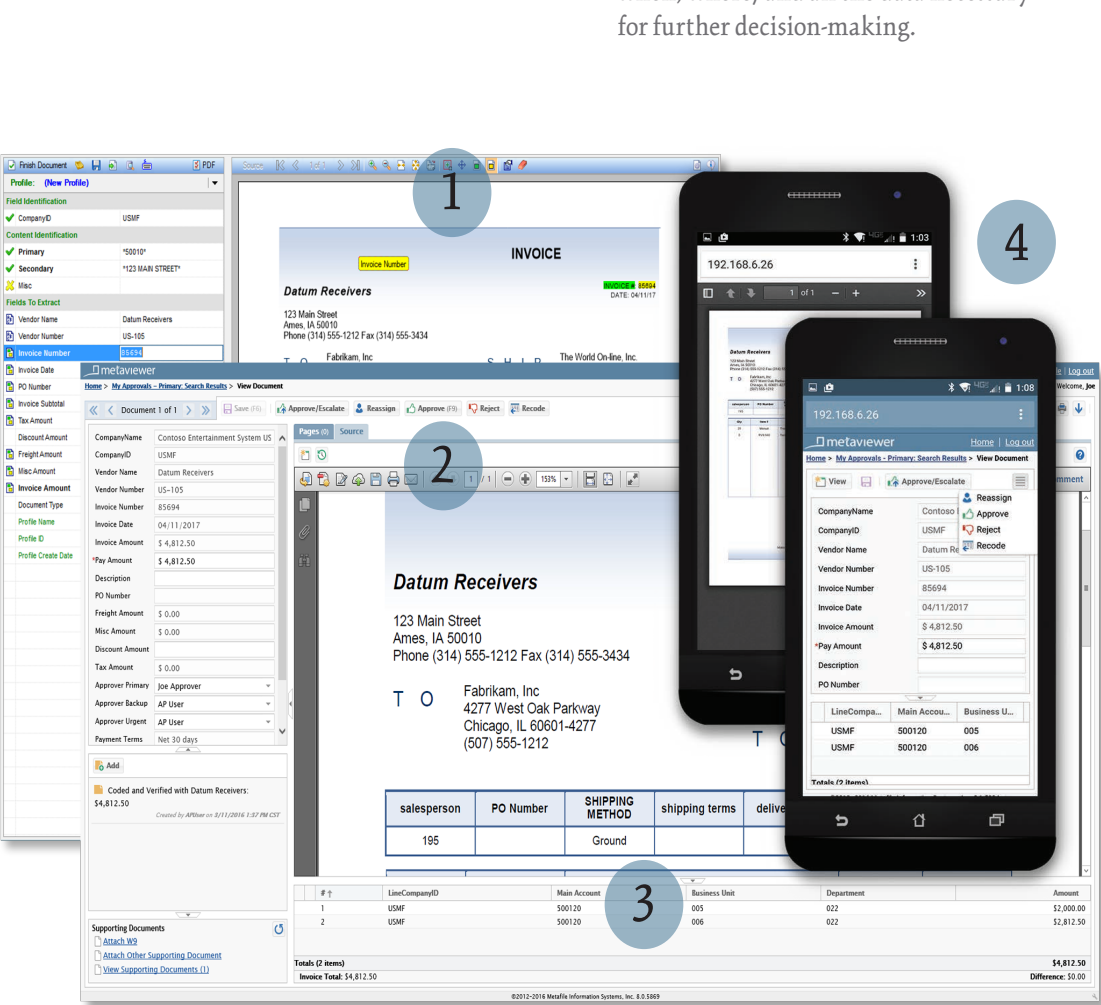
She enjoys the seamless functionality of MetaViewer to further unlock the benefits of Microsoft Dynamics 365 for Operations.

MetaViewer enhances your Dynamics 365 for Operations solution by adding integrated eInvoicing, workflow and document imaging. View all transaction documents and reports directly from your ERP application.

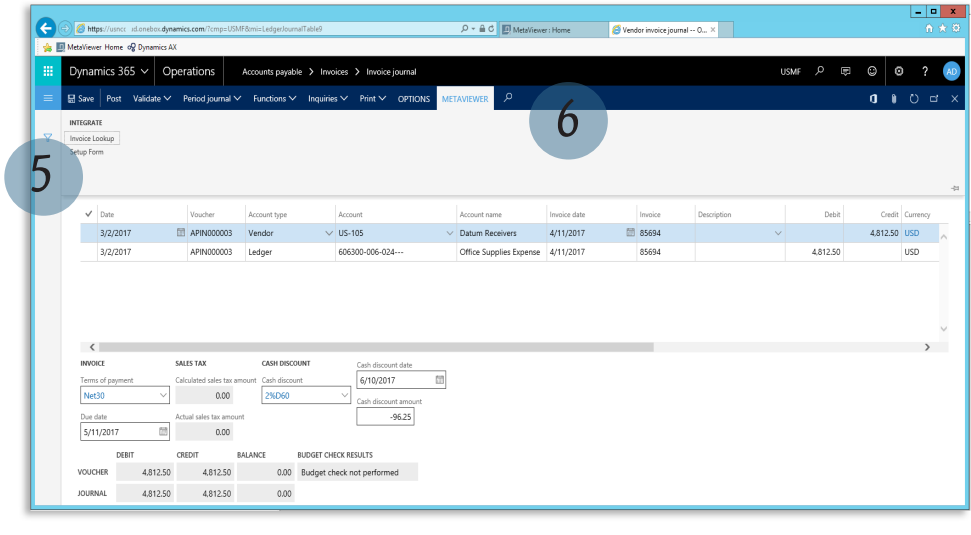
MetaViewer offers duplicate checking and purchase order (PO) validation. MetaViewer extracts data from the invoice and checks it against previously entered transactions in both MetaViewer and Dynamics 365 for Operations. Duplicate invoices are sent to an exception queue for further processing. MetaViewer also validates PO numbers and amounts by checking them against the PO details in the ERP solution. The invoice is matched against the PO items that have already been received or are still open.

MetaViewer VendorView allows your suppliers to join the self-service portal and see real-time updates on the payment status of their transactions with your organization (without harassing your AP department).

- 1 MetaViewer Invoice Accelerator automatically captures and extracts data utilizing state of the art technology from your scanned paper and electronic invoices.
- 2 Approvers and AP staff can quickly Approve, Route, Reject or Reassign an invoice using MetaViewer via the web. System generated reminder and escalation emails can be sent automatically for any invoice not processed in a timely fashion.
- 3 General ledger information can be applied to non-PO invoices; and PO invoices can be reconciled against the purchase order during the workflow process. Then the information is added to the ERP record. Once the invoice is validated, the entire transaction is uploaded to Dynamics 365 for Operations for posting and payment.
- 4 On-the-go invoice approvals, GL code viewing and more are now possible from your smartphone or tablet with MetaViewer Mobile. View pending invoices needing your attention and simply tap them to see more information, including line item details and the original copy of the invoice. Choose to approve, reject or escalate invoices from wherever you are.



- 5 MetaViewer uploads approved batches of invoices automatically to Dynamics 365 for Operations for posting and payment. This eliminates all manual data entry to the transaction screens: Invoice Journal and Pending Invoices.
- 6 A MetaViewer “retrieval” tab is easily integrated into all appropriate Dynamics 365 for Operations screens during the MetaViewer implementation. This will display the corresponding document and audit trail related to the transaction.



Bill does the math.

Compelling ROI, full visibility, and functionality well beyond AP Automation is something every financial executive can appreciate.

An average of 2%–7% of documents are misfiled, resulting in handling costs of \$120 per document. Executives and their staff spend 150 hours per year looking for these misplaced documents. AP Automation can reduce paper-based invoice processing times from 29.8 days to 4.8 days.

Reduce Costs

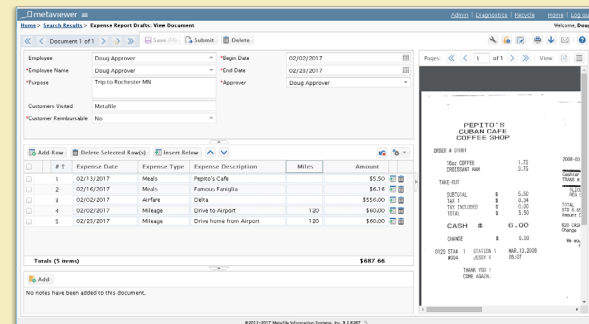
- Eliminate lost discounts
- Boost the number of invoices processed per employee
- Decrease dispute resolution time
- Reduce errors and discourage fraud
- Expose and filter out wasteful spending

Expandable Functionality

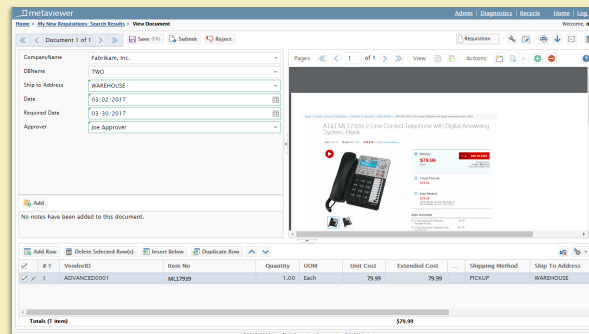
- Expense Reports
- Journal Entry
- Purchase Requisition
- New Vendor Add
- Check Batch
- Check Capture
- Product Receiving Workflow
- Contract Management
- New Hire Document Processing
- Order Processing
- Custom Report Generation

Provide True Executive Level Visibility

- Eliminate paper-based “blind spots” in your financial processes
- Real-time charting and customizable SSRS reports provide instant analytics of your current financial situation
- Easily drill down to specific transactions and documents with a single click
- Identify performance issues and bottlenecks, anticipate problems and avoid surprises



Expense reports offer convenient paperless pre-configured forms. Easy electronic access to forms and receipts in one location allows for faster management approval.



Purchase Requisitions are made simple with electronic order request forms integrated with Dynamics 365 for Operations. Create requisitions, submit for paperless approval and archive for future search and retrieval.



1. Standard and customizable charts are available to provide visibility into all your transactions. 2. Click on a segment of a chart or graph to view related documents. 3. Key metrics are tracked on an ongoing basis.

Fewer fires for Jim.

He finds MetaViewer amazingly easy. Integration is automatic. MetaViewer blends with the existing environment in perfect harmony.

Plug it in. Turn it on. Can it really be that easy? The short answer is “yes.” MetaViewer is built on the same Microsoft platform and fits seamlessly with the existing IT environment. MetaViewer automatically archives any document or report generated from your Dynamics 365 for Operations solution, providing instant access to all associated information, regardless of their source.

- Click the MetaViewer button in Dynamics 365 for Operations to view a transaction and instantly retrieve a copy of the purchase order, invoice, receiver and ACH statement.
- Capture reports, checks and correspondence produced by your financial solution.
- Automatically index scanned paper documents using information from Dynamics 365 for Operations.
- Automatically post invoice and GL information directly to your ERP solution.
- Automatically email invoices produced in Dynamics 365 for Operations to your customers.



MetaViewer Paperless Automation is available in a number of implementation strategies:

MetaViewer Fast Track. Fast Track is our real-world tested, out-of-the-box, best-practice solution designed to get your accounts payable staff up and running with an automated paperless system without delay and within your budget. Utilizing our proven best practices and time-tested software solution, Fast Track is meant to help businesses rapidly capitalize on technology that can eliminate paper from their AP processes, improving the speed and the accuracy of financial reports, cutting the costs of storing and managing paper documents and allowing the company to take advantage of vendor incentives for on-time payments.

MetaViewer Online. Software as a Service. MetaViewer in the cloud. No server issues. No back-up concerns. Always the latest version. Available anytime, anywhere, at a monthly fee.

MetaViewer Subscription on Premises. All the benefits of our hosted solution, we just implement it in your in-house or outsourced data center instead of ours. Low monthly fee, administered by MetaViewer experts.

MetaViewer Licensed Software. You purchase the software. MetaViewer experts provide the implementation and ongoing support services and enhancements for a painless transition to the benefits of Paperless Automation.



MetaViewer + Microsoft Dynamics 365 for Operations

Microsoft Partner

Gold Application Development
Silver Application Development
Silver Data Platform

To learn how MetaViewer can significantly improve your Dynamics 365 for Operations solution and experience Paperless Automation, contact your sales representative or visit www.metaviewer.com.

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